

IN THE CLAIMS

Sub B1
1. (currently amended) A method for increasing efficiency of multi-level review of proposed business deals using an organizational management tool, the tool configured with a database of deals and a plurality of authorized reviewers for the deals, said method comprising the steps of:

a) creating a ~~draft~~ proposed deal by a user at a business unit included within a business entity, the proposed deal includes at least one of a detailed description of the proposed deal, a deal pitch, information supporting the proposed deal, and a cover letter, the proposed deal further includes a maximum approver associated with the business entity wherein the user selects the maximum approver based on at least one of approval limitations and deal type for submission to a coordinator;

a
b) utilizing a computer system to transmit the proposed deal to a coordinator associated with the business entity;

b) ~~analyzing~~ c) enabling the coordinator to analyze the proposed deal, validate the information supporting the proposed deal, assign a risk manager to the proposed deal, and selecting select a list of reviewers for the proposed deal;

d) utilizing the computer system to transmit the proposed deal from the coordinator to the risk manager;

e) receiving a review summary from the risk manager including a recommendation as to whether to approve the proposed deal;

e) f) forwarding the proposed deal including the risk manager's recommendation to a next review level within the business entity;

d) g) analyzing the proposed deal including the risk manager's recommendation; and

e) h) repeating steps e) and d) f) and g) until a the next review level is the maximum approver wherein the maximum approver is then enabled to accept or decline accepts or declines the proposed deal.

2. (currently amended) A method according to Claim 1 wherein said step of creating a ~~draft proposed deal for submission to a coordinator~~ further comprises the ~~step steps~~ of attaching at least one of deal information, a pitch related to the deal, supporting materials for the deal and a cover memo for the deal enabling a business unit to utilize the computer system to upload at least one business dashboard to a central repository, and populating the at least one business dashboard with information relating to the proposed deal.

3. (currently amended) A method according to Claim 1 ~~wherein said step of creating a draft deal for submission to a coordinator~~ further comprises the ~~step of selecting a maximum reviewer for the deal~~ further comprising the step of providing a calendar tool configured to schedule at least one meeting among the selected reviewers to discuss the proposed deal.

4. (currently amended) A method according to Claim 1 wherein said step of creating a ~~draft proposed deal for submission to a coordinator~~ further comprises the step of notifying a coordinator of the proposed deal.

5. (currently amended) A method according to Claim 1 wherein said step of enabling the coordinator to analyze ~~analyzing the proposed deal and selecting a list of reviewers for the deal~~ further comprises the step of reviewing submitted documents for completeness.

6. (currently amended) A method according to Claim 1 wherein said step of utilizing the computer system to transmit the proposed deal from the coordinator to the risk manager ~~analyzing the deal~~ further comprises the step of making recommendations regarding the deal enabling the risk manager to recommend at least one of approve the proposed deal, approve the proposed deal with conditions, and decline the proposed deal.

7. (currently amended) A method according to Claim 1 wherein said step of analyzing the proposed deal further comprises the step of adding at least one of comments and recommendations regarding the proposed deal.

8. (currently amended) A method according to Claim 1 wherein said step of analyzing the proposed deal further comprises the step of appending a cover memo regarding the proposed deal.

9. (currently amended) A method according to Claim 1 wherein said step of forwarding the proposed deal to a next review level further comprises the step of sending a notification including links to proposed deals for review to a reviewer.

10. (original) A method according to Claim 9 wherein said step of sending a notification including links to deals for review to a reviewer further comprises the step of sending a delinquency notice to a reviewer.

11. (currently amended) A method according to Claim 1 further comprising the step of notifying a submitter of the ~~draft~~ proposed deal ~~that the proposed deal has been reviewed~~ each time a reviewer has completed a review.

12. (currently amended) A method according to Claim 1 further comprising the step of notifying a submitter of the ~~draft~~ proposed deal of a resolution regarding the proposed deal.

13. (currently amended) A method according to Claim 1 further comprising the step of storing a review status of a ~~draft~~ proposed deal.

14. (currently amended) A method according to Claim 1 wherein said step of forwarding the proposed deal to a next review level further comprises the step of forwarding the proposed deal to authorized users based on stored role information which limit user capabilities.

15. (currently amended) A system for facilitating multi-level review of proposed business deals within a business entity, said system comprising:

at least one computer;

a server configured to store a database of proposed business deals ~~and further configured to upload and store submitted deal drafts, upload and store at least one analysis of the deal drafts, upload a list of reviewers for the deal drafts, forward the deal draft to a next named reviewer~~

from the list of reviewers and to upload and store an approval or a declining of the draft deal;,
said server further configured to:

prompt a user to create a proposed deal including at least one of a detailed description of the proposed deal, a deal pitch, information supporting the proposed deal, and a cover letter, the proposed deal further includes a maximum approver associated with the business entity wherein the user selects the maximum approver based on at least one of approval limitations and deal type;

transmit the proposed deal to a coordinator associated with the business entity;

prompt the coordinator to analyze the proposed deal, validate the information supporting the proposed deal, assign a risk manager to the proposed deal, and select a list of reviewers for the proposed deal;

transmit the proposed deal from the coordinator to the risk manager;

receive a review summary from the risk manager including a recommendation as to whether to approve the proposed deal;

transmit the proposed deal including the risk manager's recommendation to a next review level within the business entity; and

prompt the next review level to analyze the proposed deal and, if the next review level is the maximum approver, enable the maximum approver to accept or decline the proposed deal;

a network connecting said at least one computer to said server; and

a user interface including web pages configured to allow users and reviewers to input and receive information relating to the proposed deals.

16. (currently amended) A system according to Claim 15 wherein said server is further configured to ~~upload and store at least one of a pitch related to the draft deal, supporting materials for the draft deal and a cover memo for the draft deal~~ upload at least one business

dashboard to the database, and populate the at least one business dashboard with information relating to the proposed deal.

17. (currently amended) A system according to Claim 15 wherein said server is further configured to ~~upload and store a selection of a maximum reviewer for the draft deal~~ access a calendar tool configured to schedule at least one meeting among the selected reviewers to discuss the proposed deal.

18. (currently amended) A system according to Claim 15 wherein said server is further configured to notify a coordinator that a ~~draft~~ proposed deal has been submitted.

19. (currently amended) A system according to Claim 15 wherein said server is further configured to upload and store recommendations regarding the ~~draft~~ proposed deal.

20. (currently amended) A system according to Claim 15 wherein said server is further configured to upload and store comments regarding the ~~draft~~ proposed deal.

21. (currently amended) A system according to Claim 15 wherein said server is further configured to upload and store an appended cover memo for the ~~draft~~ proposed deal.

22. (currently amended) A system according to Claim 15 wherein said server is further configured to notify a reviewer of ~~proposed deals~~ deal drafts to be reviewed and further configured to include links to those ~~deal drafts~~ proposed deals for review.

23. (currently amended) A system according to Claim 15 wherein said server is further configured to notify a submitter of the ~~draft~~ proposed deal each time a reviewer has uploaded a review.

24. (currently amended) A system according to Claim 15 wherein said server is further configured to notify a submitter of the ~~draft~~ proposed deal when a resolution regarding the ~~draft~~ proposed deal has been uploaded.

25. (currently amended) A system according to Claim 15 wherein said server is further configured to store a review status of a ~~draft~~ proposed deal.

BT 26. (original) A system according to Claim 15 wherein said server is further configured to send a delinquency notice to a reviewer.

27. (original) A system according to Claim 15 wherein said server is further configured to limit user capabilities based on stored role information.

28. (withdrawn) An electronic boardroom system for facilitating review of business operations, said system comprising:

at least one computer;

a1 a server configured to receive and store information relating to the organization within a plurality of databases, including at least one of a proposed deal review database, a business review database, a business reports database, a productivity review database, a portfolio management database, a financial report database, and an employee performance review database and to organize the information within the databases and report the information to a user for review;

a network connecting said at least one computer to said server; and

a user interface allowing users and reviewers to input and receive information relating to the business from the databases.

29. (withdrawn) A system according to Claim 28 wherein said server is configured to interface to at least one of the Internet and an Intranet.

30. (withdrawn) A system according to Claim 28 wherein said network is one of a wide area network and a local area network.

31. (withdrawn) A system according to Claim 28 wherein said server is configured to receive and store at least one role for each authorized user.

32. (withdrawn) A system according to Claim 31 wherein said server is further configured to limit user capabilities based on stored role information.

33. (withdrawn) A system according to Claim 28 wherein said server is configured to notify a system user of items requiring review.

34. (withdrawn) A system according to Claim 28 wherein said server is configured to receive and store information regarding a turn-around time required for the review of items.

35. (withdrawn) A system according to Claim 28 wherein said server is configured to store at least one of a recommendation and a comment relating to a reviewed item.

36. (withdrawn) A system according to Claim 28 wherein said server is configured to receive and store at least one audio comment relating to a reviewed item.

37. (withdrawn) A system according to Claim 28 wherein said server is further configured to store and maintain an agenda relating to items received for review.

38. (withdrawn) A system according to Claim 28 wherein said server is configured to conduct a virtual meeting and provide real-time collaboration between meeting attendees.

39. (withdrawn) A system according to Claim 28 wherein said server configured to receive and store information regarding a meeting to be held in an e-center.

40. (withdrawn) A system according to Claim 28 wherein said server configured with a portfolio management system.

41. (withdrawn) A system according to Claim 40 wherein said server configured with matrices for each product within the portfolio, the matrices including key risk factors for each product.

42. (withdrawn) A system according to Claim 41 wherein said server configured to:
set trigger levels with corrective actions for each key risk factor; and
monitor the key risk factors on an ongoing basis.

43. (withdrawn) A system according to Claim 28 wherein said server is configured to interface with a business development management system.

44. (withdrawn) A system according to Claim 43 wherein said server is configured to populate deal review databases and user interfaces with business information received from the business development management system.

45. (withdrawn) A method for reviewing business operation using a system configured as an electronic boardroom, the system including a server configured to receive and store information relating to the organization within a plurality of databases, said method comprising the steps of:

maintaining an agenda relating to items received for review.

notifying meeting attendees of pending board virtual meetings;

uploading inputs regarding the virtual meeting from each meeting attendee to the server;

notifying meeting attendees of inputs uploaded from other meeting attendees; and

uploading and storing resolutions made by the board regarding the business.

46. (withdrawn) A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of searching stored role information of authorized users to determine meeting attendees.

47. (withdrawn) A method according to Claim 46 wherein said step of searching stored role information of authorized users further comprises the step of limiting user capabilities based on stored role information.

48. (withdrawn) A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of notifying a system user of items requiring review.

49. (withdrawn) A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of informing users of a turn-around time required for the review of items.

50. (withdrawn) A method according to Claim 45 wherein said step of uploading inputs regarding the virtual meeting further comprises the step of uploading at least one of a recommendation and a comment relating to a reviewed item.

51. (withdrawn) A method according to Claim 45 wherein said step of uploading inputs regarding the virtual meeting further comprises the step of uploading at least one audio comment relating to a reviewed item.

52. (withdrawn) A method according to Claim 45 wherein said step of notifying meeting attendees of inputs uploaded from other meeting attendees further comprises the step of conducting a virtual meeting and providing real-time collaboration between meeting attendees.

53. (withdrawn) A method according to Claim 45 wherein said step of maintaining an agenda relating to items received for review further comprises the step of interfacing the system with a business development management system.

54. (withdrawn) A method according to Claim 45 wherein said step of interfacing the system with a business development management system further comprises the step of populating deal review databases and user interfaces with business information received from the business development management system.

55. (withdrawn) A method for managing a business portfolio using a system including a server configured to receive and store information relating to the organization within a plurality of databases, said method comprising the steps of

uploading matrices for each product within the portfolio including key risk factors to the server;

setting trigger levels with corrective actions for each key risk factor; and

monitoring the key risk factors on an ongoing basis.